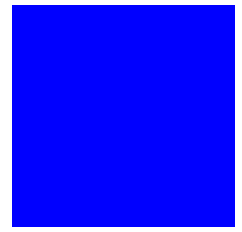


# **CIMS Lab, Inc.**

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## **CIMS Server**

### **Release Notes**

**Version 4.0**

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## Database Backup

It is extremely important that you back up your CIMS Server database(s) so that you can recover your data in case of media failure or natural disaster. CIMS Lab recommends that you back up your database(s) weekly and that you back up to a *different server at another site*.

CIMS Lab also recommends that you use the Database Maintenance Plan feature included with SQL Server to schedule and perform backup and maintenance tasks for databases. For more information, refer to “Backing Up and Maintaining Databases” in Chapter 5 of the *CIMS Server Administrator’s Guide*.

## Upgrading to CIMS Server 4.0

To upgrade CIMS Server, follow the instructions in “Upgrading to a New Release of CIMS Server” in Chapter 2 of the *CIMS Server Administrator’s Guide*. Note that CIMS Server 4.0 includes a database upgrade. You will be prompted to upgrade the database when you start CIMS Server Administrator (see *After Upgrading*).

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**Important!** • When you upgrade to a new version or release of CIMS Server, make sure that you install the program in the same folder as the existing CIMS Server installation. If there is a reason that you want to keep your previous CIMS Server version and install the upgrade, contact CIMS Lab Technical Support at (800) 283-4267.

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## Before Upgrading

Before you begin the upgrade, back up the CIMS Server database and the CIMS Lab folder.

## After Upgrading

CIMS Server 4.0 contains a new database version. You will receive a notification message that a database upgrade is available when you start CIMS Server Administrator. Click **Yes**, and then click **Upgrade Database**.

If the database upgrade fails, it is probably because the hard disk or SQL Server log file is full. Note that you should set the SQL Server recovery model to **Simple** to keep log files smaller (refer to “Setting the Database Recovery Model” in Chapter 5 of the *CIMS Server Administrator’s Guide*).

Once you have rectified the problem, close and restart CIMS Server Administrator. You will be prompted again to upgrade the database and the upgrade will continue from where it failed.

## New Features and Updates

The following sections describe new features and updates for CIMS Server 4.0.

### SQL Server Reporting Services Support Added

CIMS Server now supports SQL Server Reporting Services in addition to Crystal Reports for Web reporting. To configure Reporting Services for use with CIMS Server, refer to “Installing and Configuring SQL Server Reporting Services” in Chapter 2 of the *CIMS Server Administrator’s Guide*.

The CIMS standard report Invoice by Account Level, RINVC007, is now available as both a Crystal report (.rpt) and a Reporting Services report (.rdl) and more standard reports for Reporting Services will be added in future CIMS Server releases.

### Crystal Reports 10 Support Added

CIMS Lab provides Crystal Reports 9 Advanced Developer Edition with CIMS Server 4.0 (new installations only). Although not supplied by CIMS Lab, CIMS Server also supports Crystal Reports 10 Advanced Developer Edition and Crystal Reports 8.5 Developer Edition.

If you want to use Crystal Reports 10 with CIMS Server, contact CIMS Lab Technical Support for more information.

### New CIMS Job Runner Program

CIMS Job Runner is an intuitive, easy-to-use configuration tool that uses a simpler interface for running data collection, reports, scripts, and applications in batch. You can run CIMS Job Runner automatically on a scheduled basis (daily, monthly, etc.) using Windows Task Scheduler.

A key benefit of CIMS Job Runner is its ability to create log files that document the results of the job that is run. If a warning or failure occurs during job processing, the log file indicates at which point the warning/failure occurred.

E-mail notification that the job completed (whether successfully or unsuccessfully) along with the attached log file is automatically sent to the appropriate recipients.

For information about using CIMS Job Runner for data collection, refer to the *CIMS Data Collectors for Microsoft Windows Installation and User Guide*.

For information about using CIMS Job Runner for running batch reports and scripts, refer to the *CIMS Server Administrator’s Guide*.

### .Net Required for Custom parmxxxx.asp Pages in Web Folder

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**Important!** • Any custom parmxxxx.asp pages in your ... \CIMSLab\Server\Web folder must be rewritten to a .Net version. If you are not sure if the requirement is applicable to you or you need assistance with the conversion to .NET, contact CIMS Lab Technical Support.

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## **New E-mail Distribution Feature for Reports**

CIMS Server's powerful reporting options have been enhanced to include automatic e-mail distribution for reports. This feature enables users to receive e-mail notification when a report is available. Depending on the options set for the distribution, the report will either be attached to the e-mail or will be available via a link in the e-mail.

The CIMS Server Administrator GUI has been updated to include an interface for configuring report distribution and new scripts have been added to run and support the distribution process (see *New Batch Reporting Scripts*). For a complete description of the e-mail distribution feature and its components, refer to "Working With Batch Reporting/Published Reports" in Chapter 4 of the *CIMS Server Administrator's Guide*.

## **New Batch Reporting Scripts**

The architecture for batch scripts has changed to support the new e-mail distribution feature. A new script, `ReportDistribution.wsf`, has been added to automate the process of creating and distributing published reports. This script calls the `BatchReport.wsf` script, which was used in previous CIMS Server releases, and a new script named `EmailDistribution.wsf`.

For more information about CIMS batch scripts, refer to "Batch Reporting Scripts" in Appendix C of the *CIMS Server Administrator's Guide*.

## **New Dynamic Account Code Selection Feature**

You can now assign multiple account code structures to a user group. This feature enables users in the group to select the account code structure that they want to use to generate reports from the CIMS Server Web Reporting Web site.

To set up this feature, refer to "Defining User Groups" in Chapter 3 of the *CIMS Server Administrator's Guide*.

To use this feature, click **Admin ▶ User Options** on the CIMS Server Web Reporting menu bar. The **Account Structure** select box has been added to the Set User Options page.

## **New Proration Program CIMSPRAT**

The CIMSPRAT program processes the resources in CSR and CSR+ file records and creates a new file with prorated resources. Proration enables you to distribute resources and costs for a specified rate code or codes or all rate codes across multiple accounts at a specified percentage.

Although you can perform proration using CIMSBILL, CIMS Lab recommends that you use the CIMSPRAT program. CIMSPRAT provides more options for proration and enables you to prorate resources multiple times. CIMS Server will continue to support proration using CIMSPRAT or CIMSBILL.

For information about using CIMSPRAT, refer to "Setting Up Proration Files" in Chapter 2 of the *CIMS Data Collectors for Microsoft Windows Installation and User Guide*.

## CIMS Server Resource Plus (CSR+) Files Now Created by CIMSACCT

CIMSACCT now includes the option of producing a CSR+ file in addition to the Detail file that is sent to CIMSBILL. This feature enables you produce a CSR+ file that reflects account code conversion and/or other processing options provided by CIMSACCT.

Examples of the use of CSR+ files from CIMSACCT include processing by CIMS Mainframe, processing by CIMSPRAT to perform proration, or use by custom scripts.

To create a CSR+ file from CIMSACCT, you need to select the **Create CSR Plus** check box in the Edit Process Definition dialog box (**Chargeback Administration** ▶ **Processing** ▶ **Process Definitions** ▶ **Edit** ▶ **CIMS Account Options tab** ▶ **Files tab**).

## Define Field Length Increased

The define field length has been increased from 8 characters to 128 characters. Note that the overall length of all define fields added together cannot exceed 128 characters.

## Internationalization Updates

The following updates are applicable if you are internationalizing CIMS Server. These updates set the locale ID for the CIMS Server Web Reporting Web site and the regional settings used by Crystal Reports 9 and 10.

- A new configuration option for internationalization has been added to CIMS Server Administrator. This option enables you to set the locale ID for the CIMS Server Web Reporting Web site. If you want to use regional settings other than US English, you need to type the locale ID in the **Site Localization ID (LCID)** box of the Configuration dialog box (**System Administration** ▶ **Configuration Information** ▶ **Web tab** ▶ **General subtab**).

For more information about setting the locale ID, refer to “Web Settings” in Chapter 3 of the *CIMS Server Administrator’s Guide*.

- If you are using Crystal Reports 9 or 10, the Crystal Report Application Server (RAS) uses the local system account for the Web server by default. If you do not change this default setting, Crystal Reports uses the regional settings for the local system account. If you do not want to use the local system account settings, you need to change the RAS log on to an account with the correct regional settings.

For more information about setting up for internationalization, including changing the RAS log on, refer to “Internationalization Setup” in Chapter 2 of the *CIMS Server Administrator’s Guide*.

## New Data Collectors

The following CIMS Data Collectors have been added: Citrix, Netflow, VMware, Windows System Resource Manager (WSRM).

For more information about these collectors, refer to the *CIMS Data Collectors for Microsoft Windows Installation and User Guide*.

## New Reports

The following standard reports are new. To view these reports, go to <http://www.cimsserver.com>.

- **Job Cost Report (RJOB001.rpt)**. This report provides costs by job name. Rather than using costs from CIMSSummary table, this report calculates costs directly using rate code values and options (rate shifts, resource conversion, etc.) from the CIMSRate table.
- **MS Exchange 2000 Resource Report (REX2R001.rpt)**. This report provides Exchange 2000 Server data for the parameters selected.
- **MS SQL Server 2000 Resource Report (RMS2R001.rpt)**. This report provides SQL Server trace log data for the parameters selected.
- **Disk Directory Resource Report (RWDKR001)**. This report provides Windows disk storage data for the parameters selected.
- **Detail Rate Codes by Identifiers (RDRIR001.rpt) and Detail Rate Codes by Identifiers/Account (RDRIR002.rpt)**. These reports show resource units consumed for a maximum of five rate codes and five identifiers. The Detail Rate Codes by Identifiers/Account report further displays the data by account code.

## New Scripts

The following scripts have been added to the `... \CIMSLab \Scripts` folder. For more information about these scripts, refer to Appendix C of the *CIMS Server Administrator's Guide*.

- **MainframeClientContactToServer.wsf (located in the Scripts \Client Load folder)**. This script loads client and contact data from the CIMS Mainframe Client file into the CIMSClient table. This script retrieves the CIMS Mainframe Client file data from the CIMS Report Writer report SPWTR806.
- **SampleBulkUserLoad.wsf**. This script loads users into the CIMSUser table. A user group with the same name as the user ID is created in the CIMSUserGroup table.
- **SaveDBSQLServer.wsf**. This script enables you to easily send your database to CIMS Lab for troubleshooting purposes. This script automates the process of detaching the database, creating a zip file with the .MDF and .LDF files, and then reattaching the database.



## Using Multiple Web Sites for Web Reporting: Possible Change to CIMSReporting Folder Required

If you are using multiple Web sites for Web reporting, you might receive the following error when you attempt to access a Web site other than the default site:

Server Error in '/*virtual directory name*' Application

To resolve this problem, do the following:

- 1 In IIS Manager, navigate to and expand the virtual directory for the Web site.
- 2 Right-click the CIMSReporting folder, and then click **Properties**.
- 3 In the CIMSReporting Properties dialog box, click the **Create** button next to the **Application name** box.
- 4 Click **OK** when you are finished.

## Case-Sensitive Databases Not Supported

CIMS Server 4.0 does not support case-sensitive databases. By default, SQL Server instances are case-insensitive.

When you are creating a database for CIMS Server, click `SQL_Latin1_General_CP1_CI_AS` in the **Collation name** box. This ensures that the correct collation type, including case-insensitivity, is used.

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**Note** • Make sure that you select only the `SQL_Latin1_General_CP1_CI_AS` collation type and not a type that looks similar. CIMS Server currently does not support other collation types.

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For additional information and assistance, contact CIMS Lab technical support.

## Changes and Fixes

The following changes and fixes are new for CIMS Server 4.0.

### **CIMS Data Collectors Changes**

The architecture for running CIMS Data Collectors has been simplified. You can now define all collectors in one easy-to-use XML job file. This job file is then executed using the CIMS Job Runner program, which logs the results of the data collection process (see [New CIMS Job Runner Program](#) on page 5).

For more information about the new architecture for CIMS Data Collectors, refer to the *CIMS Data Collectors for Microsoft Windows Installation and User Guide*.

### **CIMS Server Administrator Changes**

- The **Change Rate Group Sequence** option has been added to the Rate Group Maintenance dialog box (**Chargeback Administration ▶ Chargeback Table Maintenance ▶ Rate Groups**). This option enables you to set the order in which rate groups appear in reports.
- The **Email Address** box has been added to the User Maintenance dialog box (**System Administration ▶ Users and Groups ▶ Users ▶ Edit**). This box supports the new e-mail distribution feature for published reports. An e-mail address is required if you want the user to receive reports via e-mail.
- The **Selected Account Code Structures** and **Available Account Code Structures** boxes have been added to the Group Maintenance dialog box (**System Administration ▶ Users and Groups ▶ Groups ▶ Edit**). These boxes support the new dynamic account code structure selection feature. For more information about these boxes, refer to “Defining User Groups” in Chapter 3 of the *CIMS Server Administrator’s Guide*.
- **Report Distribution** has been added to the CIMS Server Administrator tree menu (**System Administration ▶ Reporting ▶ Report Distribution**). This node supports batch generation and distribution of published reports. For more information, refer to “Working With Batch Reporting/Published Reports” in Chapter 4 of the *CIMS Server Administrator’s Guide*.
- The option **Deploy Reporting Services Report Image** has been added under **System Administration ▶ Reporting**. If you want to use a logo for Reporting Services reports other than the default CIMS logo, you need use this option as described in “Changing the Logo in Reports” in Chapter 4 of the *CIMS Server Administrator’s Guide*. This section also describes how to change the logo for standard Crystal reports.